

# Microsoft Teams

## Creating Space for Hybrid and Remote Staff to Thrive

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**ABSTRACT** Grace Simons, Electronic Resources and Cataloging Librarian, and Cathy Mayer, Visiting Instruction Librarian, share a belief that academic libraries can practice hospitality for staff members (librarians and paraprofessionals) by re-imagining workflows through expanded use of digital platforms. In this Atla 2022 conference session, Simons and Mayer shared their experience utilizing Microsoft Teams at North Park University's Brandel Library and invited attendees to reflect on how ideas shared might be applied at other Atla institutions. Content shared is intended to provide a high-level introduction to Microsoft Teams and explores three themes: needs that drove adoption at Brandel Library, a tour of the platform highlighting key functions, and ideas for organizational strategies that can be adapted by others.

### ADAPTING FOR HYBRID AND REMOTE WORK

In a June 2021 Harvard Business Review (HBR) Digital article, Sue Bingham, founder and principal of HPWP Group, notes that developing remote and hybrid work policies must take a higher view than simply considering the number of days in or out of an on-site office setting. Bingham implores organizations to recognize that regardless of the amount of time spent in a specific location, “employers must get serious about adapting to employees’ need by soliciting their input along the way” (Bingham 2021).

Bingham’s advice is helpful, but perhaps even more helpful is the opportunity academic librarians have to follow advice commonly attributed to Winston Churchill and “never let a good crisis go to waste.” Based on our experience during the COVID-19 pandemic, academic libraries can now frame the potential for effectively leverag-

ing future hybrid and remote work policies and practices upon our recent experience. To constructively reflect on the pandemic and the ways it can help shape the future remote and hybrid work of academic libraries, consider the following questions: (1) what benefits have you encountered during hybrid or remote work, and (2) what pain points have you experienced?

### **NEEDS: PLACE, PROCESS, AND PEOPLE**

Responding to employee needs requires that organizations, whether an academic library or broader university, consider the *place* where work is done, the *processes* that foster (or possibly inhibit) work, and the *people* engaged in workflows. Each of these elements may introduce priorities and needs that initially appear in conflict with one another. Thus, it is vital for organizations to foster open dialog and iteratively form remote and hybrid work arrangements.

As many academic libraries face the reality of lean staffing because of frozen or eliminated positions due to budget cuts, the time for re-evaluating the ways we work is now. If you are a manager of people in your organization, carve out time for yourself and your team to cultivate awareness of latent functionalities in tools available. Though you may not have felt like there was (or is) time for exploration, prioritizing reflection and reconsidering workflows can be a powerful opportunity to identify what your staff values.

### **THE PROCESS OF REIMAGINING WORK WITH AND FOR HYBRID AND REMOTE STAFF**

Lynda Gratton, a professor at the London Business School, proposes three crucial questions for workflow reimagination at companies—which are equally relevant to libraries:

1. Are any team tasks redundant?
2. Can any tasks be automated or reassigned to people outside the team?
3. Can we reimagine a new purpose for our place of work?  
(Gratton 2021, 73)

Gratton also sagely cautions organizations embracing hybrid and remote work, noting: “New hybrid arrangements should never replicate existing bad practices—as was the case when companies be-

gan automating processes, decades ago. Instead of redesigning their workflows to take advantage of what the new technologies made possible, many companies simply layered them onto existing processes, inadvertently replicating their flaws.... (Gratton 2021, 72).” Libraries have not been exempted from this pitfall!

Thus, before implementing a new tool, it is imperative that leaders and library staff members reflect on their own work styles and preferences. In Bingham’s HBR article, she provides questions to help recognize individual preferences. These questions have been adapted below for consideration within an academic library context. Key questions include:

- What helps you focus?
- What distracts you?
- What tools do you need to perform your job well?
- What tools does your library need to perform well?
- What communication methods work best for you when working within the team?
- What communication methods work across the university or seminary?
- What communication methods work best with patrons? (Bingham 2021)

Leaders can also benefit from reflecting on and facilitating discussion of questions. Bingham suggests uncovering productivity and collaboration needs, including:

- Are the team’s benchmarks, goals, and deadlines clear?
- Do you understand what is expected of you and what constitutes successful performance?
- How often do you communicate across teams or with patrons? During what hours do you most often overlap? (Bingham 2021)

Understanding of the needs and preferences of a particular organization is foundational to recognizing that utilizing Microsoft Teams is not a one-size-fits-all solution. Strategies utilized at Brandel Library may not fit the culture and needs of other academic or seminary libraries. Moreover, the approach utilized by Brandel’s current library staff may not fit the changing needs of the future team. To this end,

deploying Microsoft Teams should be an iterative and flexible process, subject to periodic review and revision. Whether assembling as part of a monthly staff meeting or annual staff retreat, team members can benefit from time dedicated to reflecting upon and answering the following, library-adapted questions posed by Bingham:

- What benefits have you seen from using Teams?
- What difficulties have you encountered?
- Should we make any adjustments in how we collaborate?  
(Bingham 2021)

### **CASE STUDY: BRANDEL LIBRARY**

At Brandel Library, staff involved in deploying Microsoft Teams include five full-time on-site librarians, one remote full-time librarian, and three part-time librarians. Except for a student worker who functions as a part-time assistant to the director, student employees were not enfolded into the Brandel Library Team on the Microsoft platform.

Although Microsoft Teams was first adopted by Brandel Library staff out of necessity at the start of the COVID-19 pandemic, reimagination for deploying the tool was encouraged by Library Director Matt Ostercamp. Ostercamp charged Simons and Mayer with the task of collaboratively charting a path for broader deployment of Microsoft Teams at the anticipated staff retreat in March 2022.

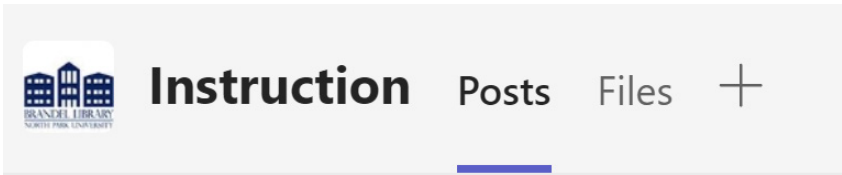
Simons and Mayer began by identifying goals for expanded use of Microsoft Teams within the Brandel library staff. Three goals for implementation were identified. First, fostering community among the staff was a primary motivator. The pandemic and continuing social distancing precautions necessitated by the January 2022 wave of the Omicron variant left staff members perpetually unable to gather face-to-face as they had historically been accustomed to doing. Although the Omicron wave passed, an out-of-state move and permanent transition to remote work for Simons highlighted the continued importance of finding ways to foster community via Microsoft Teams. The final stated goal was to foster access, specifically to enhance information sharing among the lean staff and better prepare for transitional periods, like medical leaves and onboarding new members. The final goal was to foster navigation by taking advantage of cloud-based capabilities and introducing shared file organization strategies to promote proactive management of files.

Simons and Mayer set to work identifying ways to accomplish the goals and presented them within the context of a “Teams Tour” at the Brandel Library Spring Break 2022 staff retreat. The tour began by examining the group’s existing “Brandel Staff Chat” thread. Originally created at the inception of the pandemic, discussions in the thread had ranged from work-focused conversation to conversations about the strange new reality of life and recipe exchanges. To support the goal of fostering community, the chat thread was designated for future use as a place for social interaction that would solely feature conversations on casual, non-work-related topics.

To better convey the new intent of the thread, library staff members were invited to rename the chat group. After considering “Brandel Social” and “Brandel Water Cooler” staff members selected a title that acknowledged the Swedish heritage of North Park University: Brandel Fika. In the months since the purpose of the chat was clarified, the channel has hosted conversations featuring news articles, photos, videos, moments of celebration, and holidays.

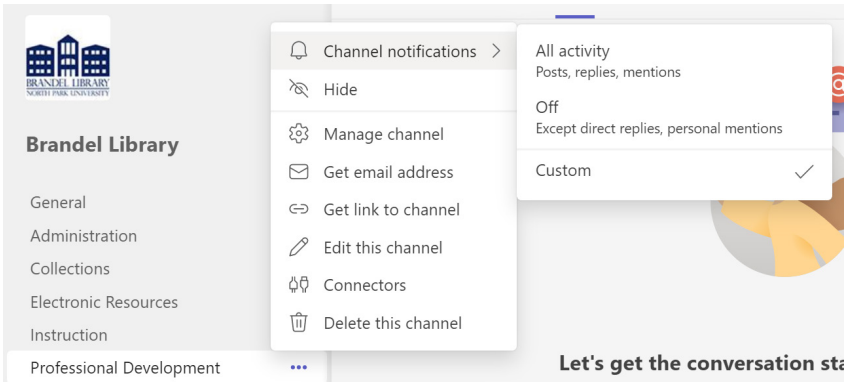
One unintended benefit of expanded-use chat has come through increased full-team engagement. In January 2022, Brandel Library welcomed Mayer, as a Visiting Instruction Librarian, and Blanca Hernandez, as Reference and Outreach Librarian, who predominantly works afternoon and evening shifts. Historically, enfolded new team members relied upon opportunities for informal interactions to augment initial training. Meanwhile, part-time and evening staff were not fully enfolded into the library’s culture due to limited opportunities for engagement with daytime staff. Thanks to the Brandel Fika chat thread, opportunities to build community, regardless of when and where team members are scheduled, have been fostered through time-shifted dialog. In addition to the chat thread, the Brandel team further fosters community by gathering as a group, based on availability, for a 30-minute “Fika” video call.

In Teams, specific channels can be set up for focused conversations. The Brandel Library created channels for Administration, Collections, Electronic Resources, Instruction, Professional Development, Public Services, and Reference. Once a channel is established, chat conversations can be held within that channel. Channels can also be linked to existing OneDrive folders. These files can be accessed directly from the channel and are automatically shared with anyone who is part of the channel. There is also a “+” in the navigation bar in each channel that allows users to add additional apps available from Microsoft and external parties (image 1).



**IMAGE 1.** Instruction Channel Navigation Bar. Screenshot by Grace Simons.

Channels also offer customizable notifications (image 2). There are options to see all notifications, mentions only, or further customization of when a notification will pop up onscreen and audibly ping. Regardless of notification preferences, when there is new content in a channel, it will appear bolded in the list. Channels can also be private so that the conversations and files are only accessible to specific members.



**IMAGE 2.** Channel Notifications Options. Screenshot by Grace Simons.

With multiple channels created within the Brandel Library team, library staff have been designated to serve as a “point person” for an assigned channel. Staff assigned to this role act as a caretaker and final decision maker in guiding decisions related to the maintenance of files and information dissemination related to a given channel. Initial work associated with these roles involves ensuring files are migrated from personal drives into a folder structure with clear, standardized labels, to promote easier navigation among shared users. To track decisions related to file migration and organization, searchable channel chat threads provide a space for logging progress and decisions to update colleagues.

Taking the time to intentionally think about processes and workflows and how they can be updated for use within Teams will be beneficial for implementation. Session attendees were prompted to consider what processes could be updated to create efficiency in their libraries and how Microsoft Teams might streamline workflows. Some potential ideas recommended by the presenters included onboarding and sharing files. Additionally, attendees were advised to consider how staff plan to interact and work with potential remote staff members to effectively communicate via Microsoft Teams. Presenters also suggested exploring complementary applications that can be embedded within Teams, such as project management tools like Trello and Microsoft Project, and the suite of Springshare products.

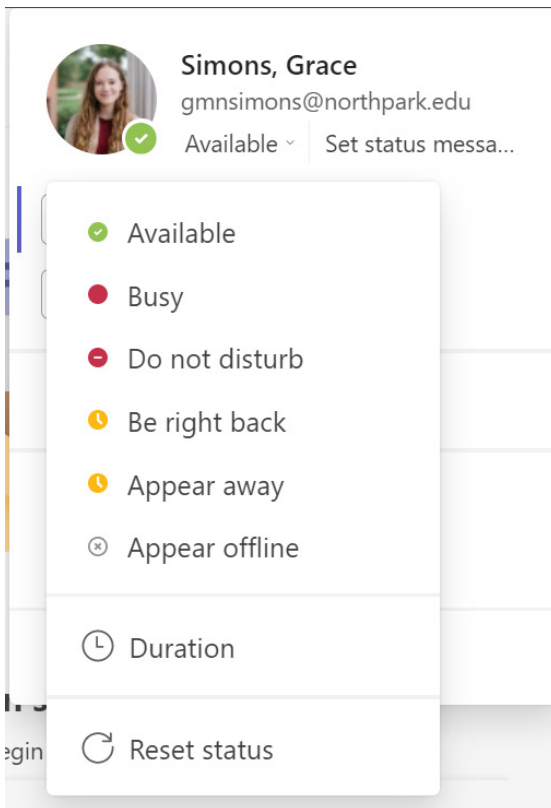
### **FOSTERING CULTURE AND CONTINUOUS GROWTH**

Although creating community via Teams within Brandel developed organically, the importance of facilitating a process to foster shared culture is supported by research reported in a 2021 article from the Harvard Business Review entitled, “How ‘Virtual Watercoolers’ Can Help New Hires.” The piece notes that as firms continue to utilize hybrid and remote workforces after the pandemic, “[O]ne issue [organizations] are likely to face is the dearth of spontaneous interactions—the conversations and camaraderie that can spring up among colleagues. Of particular concern is the effect on new employees, who often rely on such exchanges to help them learn their roles, understand the organization’s culture, and gain mentorship and support” (“How ‘Virtual Watercoolers’” 2021, 26).

Harvard Business Review’s article details research in which a large global organization divided summer interns into random groups, some of whom were offered the opportunity to participate in a 30-minute “virtual watercooler” video call conducted by a senior manager—not their direct supervisor. Meanwhile, control groups were either assigned 30-minute sessions that included Q&A with a senior manager and fellow interns, work on a group project with fellow interns, or unstructured time. At the conclusion of the summer, data showed interns who participated in watercooler sessions with senior managers felt more positive than others, received higher weekly performance ratings from supervisors, and were more likely to be offered fulltime employment. Researchers suggest that virtual watercoolers likely “facilitated information sharing and advice...that enabled

the interns to improve their job performance and career outcomes” (“How ‘Virtual Watercoolers’” 2021, 26). Academic libraries would be wise to apply these findings for staff, potentially offering “virtual watercoolers” for staff ranging from librarians to student workers.

Another important aspect of developing culture involves devoting attention to clearly identifying expectations for using Microsoft Teams, which can provide confidence and comfort for users. Articulating guidance and expectations for monitoring, prioritizing, and responding to communication modes—e.g., chat, channels, and e-mail—can help set healthy rhythms and boundaries for communication within a library. For example, although there is a Teams app available for smartphones, employees should not be expected to monitor or view threads outside of their normal working hours. Additionally, instructing staff members in the use of features, such as status messages, can further support healthy boundaries for effective work (image 3).



**IMAGE 3.** Teams Status Message Options. Screenshot by Cathy Mayer.



For additional ideas on how to make the most of Microsoft Teams, consider exploring articles featured under the “Business Tips” portion of Microsoft’s website. These short pieces can provide helpful ideas and foster shared discussion. For example, a library leader may pre-assign the article “Your Guide to Chat Etiquette in the Workplace” before an upcoming meeting (Microsoft Tips, n.d.). Then, as a group, the staff can identify key ideas from the article that were novel or helpful. The staff could also articulate points of disagreement with Microsoft’s etiquette recommendations, identifying if and how they diverge from the existing culture and workflows of the library staff. Ultimately, such conversations can provide reflective opportunity for iterative growth when facilitated by leaders who embrace a growth mindset in the use of Microsoft Teams.

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